

Pegasys Quick Reference Guide

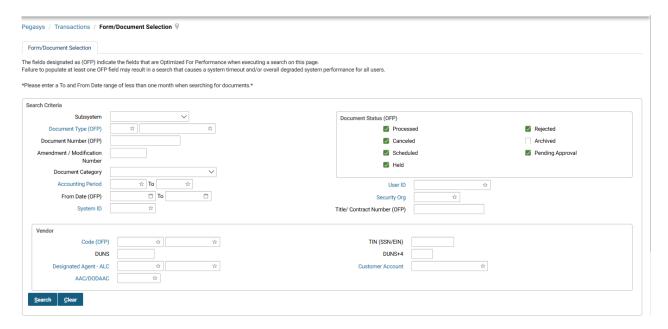
Routing Forms and Documents

Users can send forms or documents to other Pegasys users for correction or review.

NOTE: Detailed information on routing can be found in the Finance User Guide.

- 1. Select **Transactions** \rightarrow **Form/Document Selection** from the Pegasys menu.
- 2. Search for a previously saved form or processed document by entering the appropriate data in the **Search Criteria** fields.
 - a. OFP (Optimized For Performance) fields are labeled on the Form/Document Selection page. Failure to populate at least one OFP field may result in a search that causes a system timeout and/or overall degraded system performance for all users.
- 3. Select Search.

Figure 1: Form Document Selection



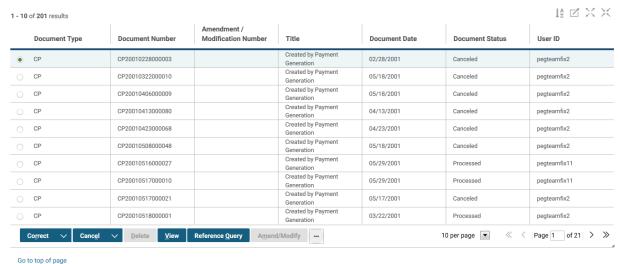
- 4. Select the appropriate record from the generated list.
- 5. Select Route.

NOTE: On a new form, select the Save button. Forms must first be saved successfully before users may route them to others for review.



Pegasys Quick Reference Guide

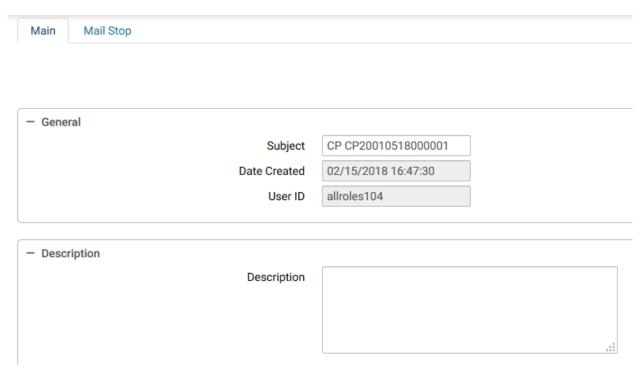
Figure 2: Form Document Search Results



6. Edit the **Subject** and **Description** fields as necessary.

NOTE: Information entered into the Description field will appear in the Inbox Description field.

Figure 3: Main Tab

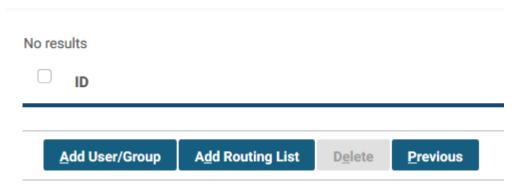


- 7. Select the **Mail Stop** tab.
- 8. Select **Add User/Group** to individually select recipients of the routed item.



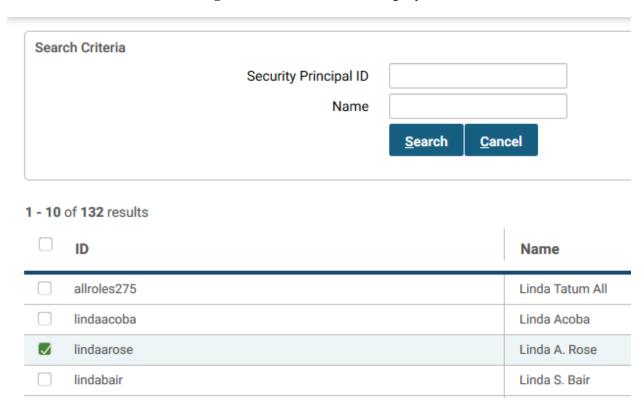
Pegasys Quick Reference Guide

Figure 4: Add User Group



- 9. Enter your search criteria in the appropriate fields.
- 10. Select Search.
- 11. Highlight the record for the recipient of the form or document.
- 12. Click Select.

Figure 5: Search Results Displayed



- 13. The selected user will be added to the list of recipients on the Mail Stop page.
- 14. To select multiple recipients saved in a routing list, select **Add Routing List**.



Figure 6: Add User Group and Routing List



- 15. Repeat steps 9 12 to search for and select a routing list.
- 16. The users saved in the routing list will be added to the list of recipients on the Mail Stop page.
- 17. Review the list of recipients, and select **Previous**.

Figure 7: Select Previous Option



- a. The form or document will be sent to the recipients in the order listed on the Mail Stops page.
- 18. Select Send.

NOTE: If you route many forms/documents to the same individuals, you can create a routing list for that group by using the Create a New Routing List reference document.